

Financial Services Guide

Investment Manager Profile

Version 13.0 Dated 12 July 2023

The **Financial Services Guide (FSG)** is an important document. You should read it carefully and make sure you understand it. To assist you in choosing a Representative, our Representatives are required to provide an FSG and an Investment Manager profile.

1. Who will provide your services?

The financial services referred to in this FSG are offered by:

Winston Sammut ('Adviser') ASIC Authorised Representative Number 295662
Address Level 7, 7 Macquarie Place Sydney NSW 2000
Telephone 0411 401 576 1300 130 545 (Free call)
Email winstonsammut@sequoia.com.au

2. About Your Investment Manager

Winston Sammut joined Sequoia Asset Management as Investment Manager in December 2022 following a career spanning 40 years in the investment industry. Prior to joining Sequoia, Winston was Head of Listed Securities at Charter Hall, managing the Charter Hall Maxim Property Securities Fund and is an expert on the domestic listed Real Estate Investment Trust sector (A-REIT) having been the investment manager of the multi award winning Maxim product for 17 years.

Winston holds the following qualifications:

Bachelor of Business Studies (Banking)- RMIT Melbourne

Fellow Australian Institute of Directors

Fellow Securities Institute of Australia (SIA).

The Financial Services which can be provided by your Investment Manager

- financial product advice (general advice only)
- dealing in a range of financial products including:
 - basic deposit products
 - derivatives
 - government debentures, stocks, or bonds
 - managed investment schemes including Investor Directed Portfolio Services
 - securities
 - superannuation and retirement savings accounts

to retail and wholesale clients

3. Remuneration

Winston is a salaried employee of Sequoia Asset Management Pty Ltd. All fees, commission and other remuneration or benefits are received by Sequoia Asset Management Pty Ltd.

Other Benefits – Winston may receive other benefits including share of profits, attendance at professional development programs, conferences, and other incentives such as allowances and other related entertainment benefits